

UPS Shipping User Guide

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History

Date	Version	Details
March, 2024	1.0	Updated

Introduction

In order to maintain a streamlined closing process, save time, and be more efficient, SoftPro 360 users have the ability to prepare UPS shipments directly from ProForm. SoftPro Shipping Services seamlessly populates the name, address, and phone number of the contacts in your ProForm order. This allows for the quick selection of a contact and create a UPS Shipping Label without ever leaving ProForm.

Accessing the Vendor Services

From the **360** ribbon:

- 1. Click the **Services** button
- 2. Double-click the **Add-Ins** folder to expand
- 3. Double-click UPS Shipping



- 4. From the Order Linking window,
 - If no order is open, enter the corresponding order in the **Selected Order Number** field

Order Linking	
Open Order Numbers:	
Selected Order Number:	
ОК	Cancel

 If a single order is open, the order number is shown in the Open Order Numbers field and the Selected Order Number

NOTE: The **Selected Order Number** field can be overwritten with an order that is not open.



 If multiple orders are open, all order numbers appear in the Open Order Numbers field and the first order is displayed in the Selected Order Number field. Highlight an order in the Open Order Numbers field to select the applicable order

Order Linking
Open Order Numbers: 20020000107 XOMTR-20-2021
The current active order is automatically populated as Selected Order Number
Selected Order Number: XOMTR-20-2021
OK Cancel

5. Press the **OK** button to continue

License Agreement

The first time you access **UPS Shipping** you will be taken to the **UPS Shipping – License Agreement** screen. To advance beyond this screen you must agree to the terms of the UPS Technology Agreement. The check boxes become enabled after you have read the agreement and move the right scroll bar to the bottom of the agreement.

- Using the scroll bar (to the right) scroll to bottom of the agreement
- 7. Once enabled, select the **Yes**, **I do** radio button
- 8. Click the **Next** button to continue

🥹 UPS Shipping - 2024030002	×
UPS Shipping - License Agreement	ups
Please read the following agreement carefully.	Note: You are required to scroll to the bottom of the agreement to accept.
UPS TECHNOLOGY AGREEMENT Version UTA10072022 PLEASE CAREFULLY READ THE FOLLOWING TERMS A ACCEPTANCE CHECKBOX OR OTHER ACCEPTANCE II BY THE TERMS AND CONDITIONS OF THIS AGREEMED A LEGALLY BINDING AGREEMENT WITH UPS MARKET I The permission UPS gives You to use the UPS Technolo responsibilities in: (1) these General Terms and Conditiv thtps://www.ups.com/assets/resources/media/en_US/G at https://www.ups.com/assets/resources/media/en_US/G along with the documentation referenced in any of the for You hereby confirm that You have read and fully understa General Terms and Conditions, the End User Rights, an Policies, including the documentation referenced therein DO YOU AGREE TO ACCESS THE UPS SYSTEMS IN ACCORDANCE WITH AND BE BOUND BY EACH OF THE TERMS AND CONDITIONS SET FORTH ABOVE?	ND CONDITIONS. BY SELECTING TH NDICATOR, YOU AGREE TO BE BOUNN IT AND THAT YOU HAVE ENTERED INTO DRIVER, INC. ("UPS"). gy continues so long as You meet your ons ("C.pdf (2) the End User Rights available <u>EUR pdf</u> and (3) the Information and assets/resources/media/en US/GUP.ptf egoing three parts (the "Agreement"). Ind ALL PARTS of this Agreement – the d the Information and General Use
UPS, the UPS shield trademark, the UPS Ready Mark, the UPS Developer Kit Mark and the color brown are trademarks of United Parcel Service of America, Inc. All rights reserved.	Next Cancel

Shipper Information

After agreeing to the terms of the UPS License Agreement you will advance to the **UPS Shipping – Shipper Information** screen. Your contact information will be pre-populated based upon your SoftPro 360 registration.

On this screen you have the option to set defaults for **Delivery Confirmation**, **Address Validation**, **Ship Notification**, **Exception Notification** and **Delivery Notification**. Enabling these settings here will set them as the default for all users and for all labels created, however, you can modify the setting on a per label basis as needed.

- **Delivery Confirmation** options are None, Signature Required, Adult Signature Required and Shipper Release
- Address Validation: Address
 Validation is an automatic function
 that verifies the city, state, and
 postal code combination of any U.S.
 Ship To address. If UPS is unable to
 validate the combination, you will
 have the option to use a suggested
 address from an address database,
 revise the original address, or use
 the original address.
- Ship Notification: A Ship notification tells you when shipment information has been received by UPS
- Exception Notification: An Exception notification informs you about the unforeseen events resulting in a change to the expected delivery day and includes the rescheduled delivery date.

				•
Name:	Ashley Watts			
Company Name:	360 Test Organizati	on		
Address 1:	4800 Falls of Neuse	e Rd		
Address 2:				
City/State/Zip:	Raleigh	NC - 27609		
Email:	awatts@softprocorp	o.com		
Phone:	(919) 829-1122			
Default Chinmant	Sattings			
Delivery Conf	firmation: None			
Address Valio	dation: 🔲 Valida	te Addresses		
Quantum Vie	w Notify®: 🔲 Ship N	lotification		1
	Excep	tion Notification	-	
	Delive	ery Notification		
			-	

• **Delivery Notification:** A Delivery notification tells you when the shipment has been delivered

NOTE: You can get back to this screen by clicking the **Settings** button on the **UPS Shippng** screen.

Click Next to Continue.

Account Information Screen

On the **UPS Shipping – Account**

Information screen you will need to enter your UPS Account Number, choose an Account Name, and enter the zip code associated with the account. If you do not currently have a UPS account click the **Visit UPS.com** link to open a new account.

If you have negotiated rates with UPS you will need to complete the Invoice Details section.

Click **Submit** to validate your UPS account number.

	Ionnauon	V
UPS Account Number:	123475	Visit UPS.com to open
Select a Name For This Accour	nt: testing	a new OFS account
Postal Code (Pickup Location):	27609	
Invoice Details		
service invoices. This informati not receive regular invoices the Invoice Number:	on is necessary in order t se fields can be left empt	o use UPS negotiated rates. If you do y.
Charges This Period:		
Invoice Date:	March 1 2012 🔲 🔻	
		(Required only if present on invoice
Control ID:		

NOTE: You can add additional **UPS Accounts** by accessing the **Manage UPS Accounts** button found on the **UPS Shipping** screen.

Shipping Screen

For subsequent uses of UPS Shipping, the **UPS Shipping** screen will be the first screen displayed. The **UPS Shipping** screen will display all shipments created for the linked ProForm order.

Click the,

- Add Shipment button to create a shipping label
- Managing UPS Accounts button to add additional UPS accounts, view current account or renew UPS registration

Refer to **<u>Adding UPS Accounts</u>** for additional information.

 Settings button to modify Shipper Information or change default settings

UPS Tracking Numb	er Status	Created	Details
	Click "Add Shipr	ment" to create a s	shipment.

Create Shipment

The **Create Shipment** screen lists the contacts entered into the linked ProForm order.

Highlight the contact you would like to ship to and (when entered into the ProForm order) the contact's name, address and phone number populate the appropriate fields.

If additional UPS Accounts have been added, they will be available in the **UPS Account** drop down list.

You have the option to select the **Package Type**, enter the package **Weight** and select the **Service Type**. You can also select the options of **Residential Delivery**, **Validate Address** or create a **Return Label**. The **Compare Rates** link will provide estimated rates for the package type selected.

Select a Contact:		
B Bill Buyer	UPS Account:	Kathy 👻
sa Max Agent	Person:	Bill Buyer 👻
My Settlement Company	Ship To:	Bill Buyer
	Company:	
	Address:	Company's
	Address 1:	7845 North Boulevard
	Address 2:	
	City/State/Zip:	Cary NC - 27511
	Phone:	(919) 829-2240
	Pkg. Type/Wt:	UPS Letter O.1 Ibs.
	Service Type:	Next Day Air® Compare Rate
	Options:	Residential Delivery Return Label
		🔲 Validate Address 🛛 🥶 More Options

Additional Options

The **More Options** link provides additional options that can be selected on a per shipment basis.

- Additional Service Options Saturday Delivery
- **Delivery Confirmation** options are None, Signature Required, Adult Signature Required and Shipper Release
- Verbal Confirmation: To confirm delivery of your shipment, a UPS representative will call on the day of delivery, using the preferred contact telephone number listed on your UPS Next Day Air® Early A.M.® package.
- Package Dimensions: Length, Width, Height
- Large/Unusual Shape Package Large Package and Additional Handling
- Ship Notification: A Ship notification tells you when shipment information has been received by UPS (if entered into the ProForm order for the contact, the contact's email address will flow to the Email field)
- Exception Notification: An Exception notification informs you about the unforeseen events resulting in a change to the expected delivery day and includes the rescheduled delivery date. (if entered into the ProForm order for the contact, the contact's email address will flow to the Email field)
- **Delivery Notification:** A Delivery notification tells you when the shipment has been delivered. (if entered into the ProForm order for the contact, the contact's email address will flow to the Email field)

Saturd:	ervice Options ay Delivery	•
Delivery Con None	firmation •	Verbal Confirmation
Package Dim Length	width	Height
Inches - V	alid for "My Pa	ckaging" Only
Large/Unusu	i al Shape Pac Package	kage Additional Handling
Quantum Vie Ship N Except	ew Notify® otification ion Notificatio	Delivery Notification
Email: b	illbuyer@unkr	nown.com
Declared	Value: ype: Daily	Pickup 🔻
Account Ty		

- Declared Value
- Account Type options are: Daily Pickup (set by default), Customer Counter, One Time Pickup, On Call Air, Letter Center and Air Service Center

****NOTE:** Value-added service charges may apply**

Create Return Label

To create a Return Label,

- highlight the Contact the package will be shipped from
- check the Return Label check box; this changes the Ship To field to Ship From
- Click Submit



Shipment Details Screen

On the **Shipment Details** screen you can preview, print or cancel your UPS shipping label.

To track the shipment, click the **Track** link, which will take you to the UPS tracking website.

Click **Close** to close this window to return to the **UPS Shipping** screen.

Shipment Details - 201	1100003		ups
Shipping From:		Shipping To:	
kathy cada SoftPro 4800 Falls of Neuse Raleigh, NC 27615 (800) 848-0143		Sam Seller 1037 South Str Winston-Salen (888) 888-8888	eet 1, NC 27101- 8
IPS Tracking Number:	\$20.34		St Track
stimated Delivery Date:	3/8/2012		
ihipping Label:	Print Preview	Print Label	Cancel Shipment
			Clo

The **UPS Shipping** screen now displays a tracking number hyperlink for the shipment.

Click the **Tracking Number** to link to the UPS tracking website.

The Status shows,

• In Progress before the package is delivered

The **Open Shipment** button is enabled when the **Status** is **In Progress** and can be used to view the **Shipment Details** screen.

• **Completed** once the pacakge is delivered

	UPS Tracking Number	Status	Created	Details
Þ	123123131313	Completed	03/28/2012 10:42	Bill Buyer 7845 North Boulevard
	12512515151241451	Completed	03/28/2012 10:42	24/7 Ave
	1231241515151515	Completed	03/28/2012 10:44	Mac 555 Main Street

Your SoftPro **360 Queue** will update with a Transaction for the shipment. The UPS tracking number will be available as a hyperlink in the **Description** column. The link takes you to the UPS tracking website. From here you can view the **Status** as well.

ŀ	360 Queue												
	💿 Review 📖 Deliver 🙊 🤤 📋 Views: My Transactions 🛛 🛨 🎓 🗊 💼 👬 Filter: UPS 🔄 💆 🏢												
l		Transaction Number	Provider	Service	Status	Linked Order	Created By	Created On	Completed On	Description			
l	¢	410060-10-120307-003770	UPS	UPS Shipping	In Progress	2011100003	kathy cada	3/7/2012 12:44 PM		UPS Tracking # 1Z0139X00192190973			

Adding Additional UPS Accounts

When you click the Managing UPS Accounts button on the UPS Shipping screen you can,

- Add additional UPS accounts
- View current UPS account
- Renew the UPS registration The UPS registration is required if the UPS product has not been used for a period of 7 months or if the error, *Invalid Access License for the tool please relicense*, is displayed.

To add an additional UPS account,

- 1. Enter the UPS Account Number, Account Name and Postal Code
- 2. Select,
 - **My Organization** if the account should be available to all users
 - Just for me if the UPS account should only be available to you
- 3. Click the **Add UPS Account** button

Ianage UPS Accou	ints			— ×				
ld UPS Account	Current UPS A	ccounts UPS Registration						
UPS Account Number:		test	UPS.com to open					
Name For This A	ccount:	test	<u>a ne</u>	<u>swor o account</u>				
Postal Code (Pickup Location):		27612						
Account Usage:		My organization (same SoftPro license)						
		Just for me						
Negotiated Rates	6							
Authenticate you information is ne invoices these fie	r individual acc cessary in orde elds can be left	ount using information fror r to use UPS negotiated ra empty.	n your most recei les. If you do not	nt invoice. This receive regular				
Invoice Number:								
Charges This Pe	riod:							
Invoice Date:	March	n 26 2012 🔲 🔻						
Control ID:			(Required only if	present on invoice)				
🖏 Add UPS Acco	ount							
				Close				
_	_		_					
Manage UPS Acco	unts							
dd UPS Account	Current UPS A	Accounts UPS Registratio	n					
Number	Name	Pickup Zip	Туре					
123456789	Kathy	27609	Shared	Remove				
123456798	test	27609	User	Remove				

Once added, you are returned to the **Current UPS Accounts** screen.

This screen displays all UPS Accounts created under the company's serial number.

To remove an account so that it is no longer available to any user, click the **Remove** link.

Close